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Configuring Admin Settings

and more…

Kevin Houk

Implementation Specialist

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1. New Administration Settings and Features
2. Common Troubleshooting
3. Health Check
4. Q & A

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New Administration Settings

Theming (5.10.1)

- Customize the look and feel of the Informer interface to match organizational branding or user preferences. This includes adjusting colors, fonts, using **CSS** and other visual elements, ensuring a consistent and professional appearance across the platform.

- Can upload your own logo to replace the Informer one in the top left and the circle in the browser tab.

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New Administration Settings

Letterheads (5.6.0)

- Technically not new, but many under the hood updates that make it smarter and easier to use
- Usable in Templates
- ie... invoices, statements, transcripts

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New Administration Settings

Codes Management (5.10.1)

- Codes now included in Bundles
- Options to quickly select or deselect all values in a code set
- Dropdown (non-checkbox) option for Codes helping improve usability when selecting code vales

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Modern SMTP Authentication (2025.1.2)

- Added support for modern authentication using OAuth 2.0
- Can now use Google or Microsoft email more securely instead of using username/password
- Enhances security, supports MFA and SSO reducing risk of credentials being compromised

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AI (2025.1.0)

- Natural language queries
  - Ask questions in plain English and Informer will generate relevant datasets or visualizations
- AI-Driven Insights
  - Informer can automatically find trends, anomalies, and summaries from your data, helping you discover actionable insights without manual analysis
- AI Assistant
  - An integrated assistant helps users build reports, create filters, and understand data by providing context-aware suggestions and explanations
- Magic Visuals (beta)
  - Create visual representations of your data with minimal effort

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AI

- Admins can enable, restrict, and track AI features and usage across users and teams, supporting usage-based billing and compliance.

- Manage available AI models, integrations, and privacy settings to ensure secure and policy-compliant AI adoption.

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New Administration Settings

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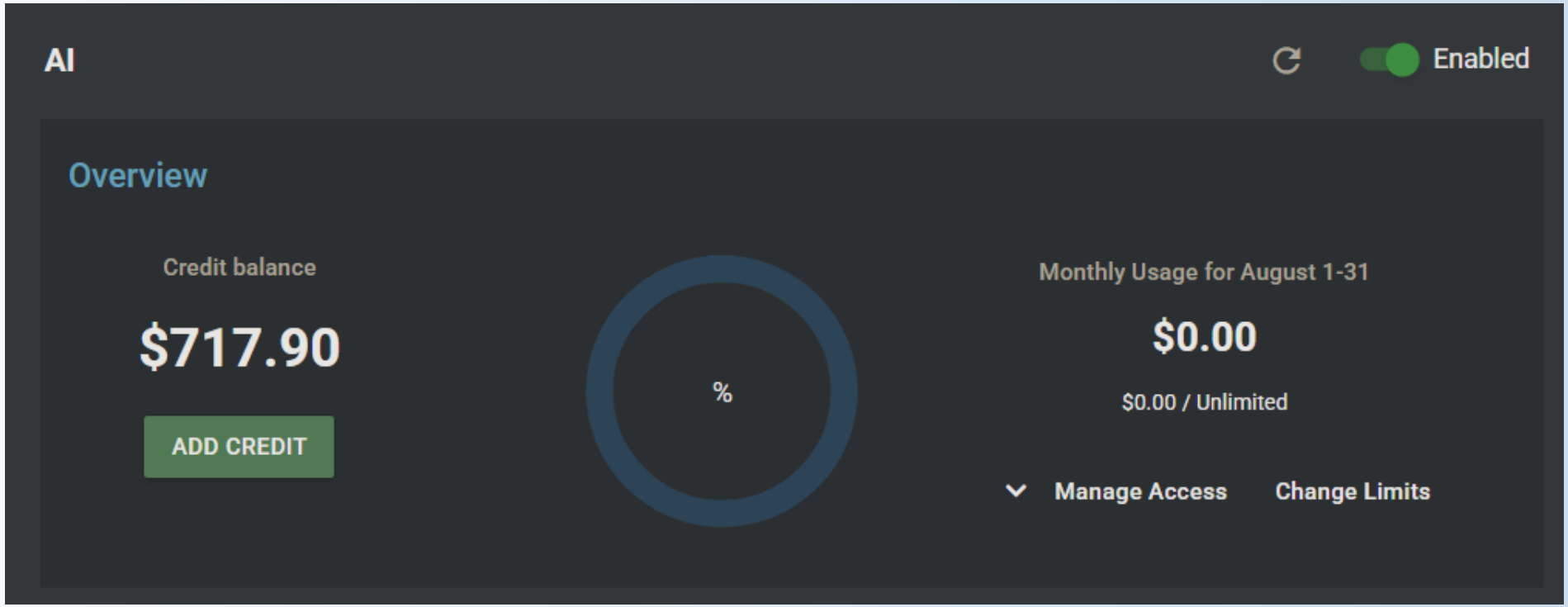
AI Overview



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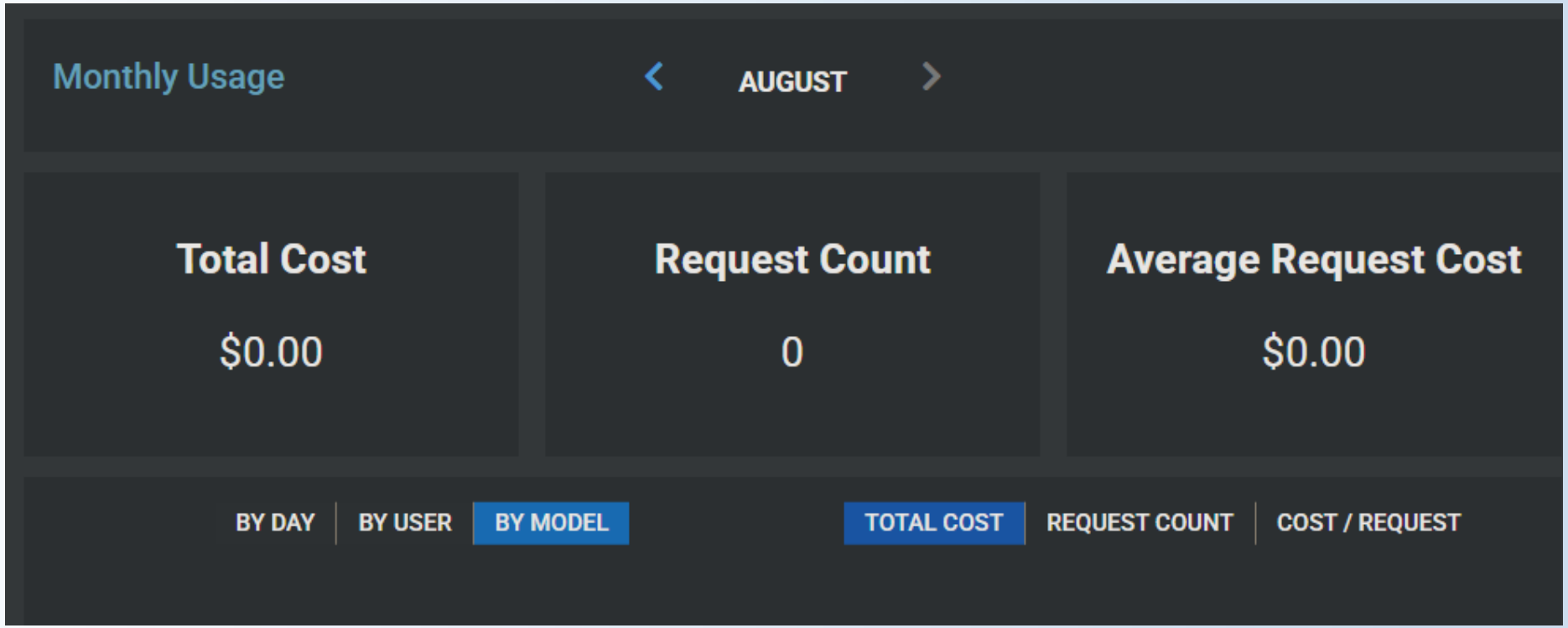
AI Usage



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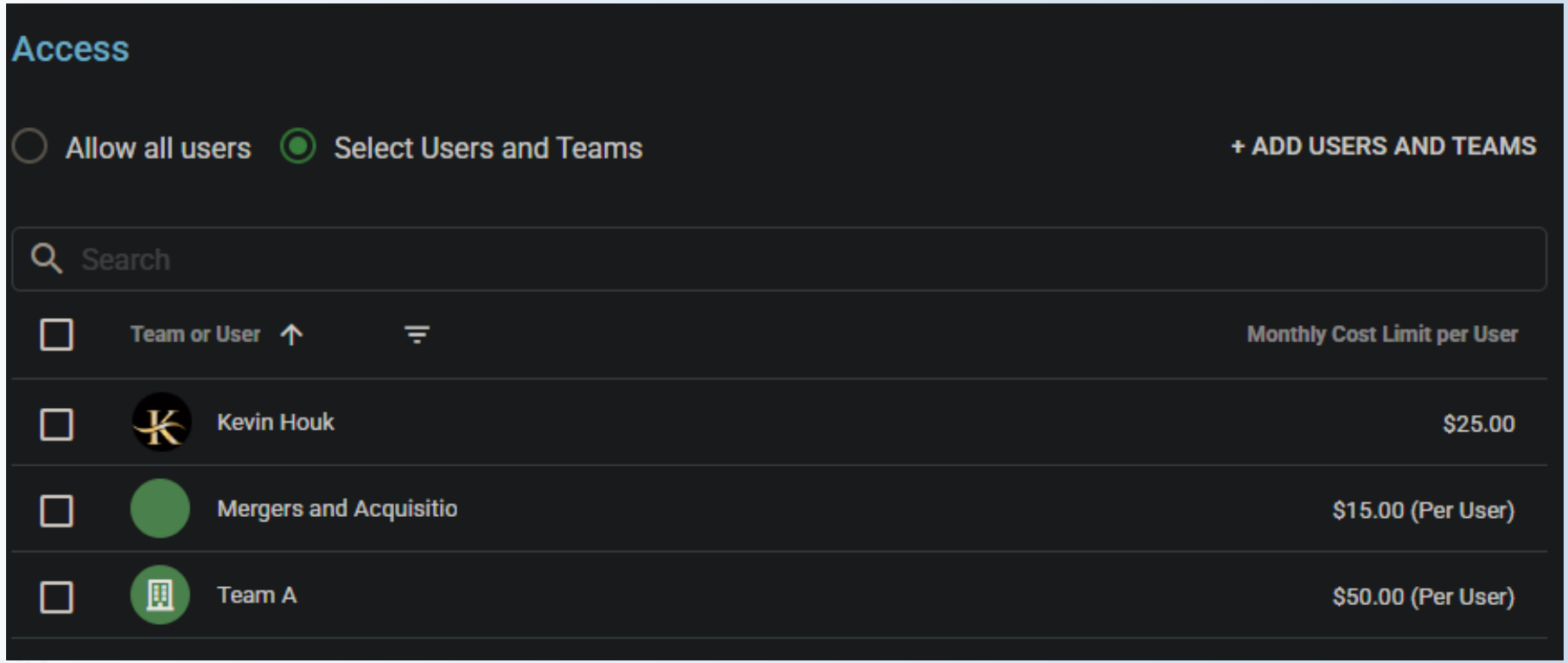
AI Access



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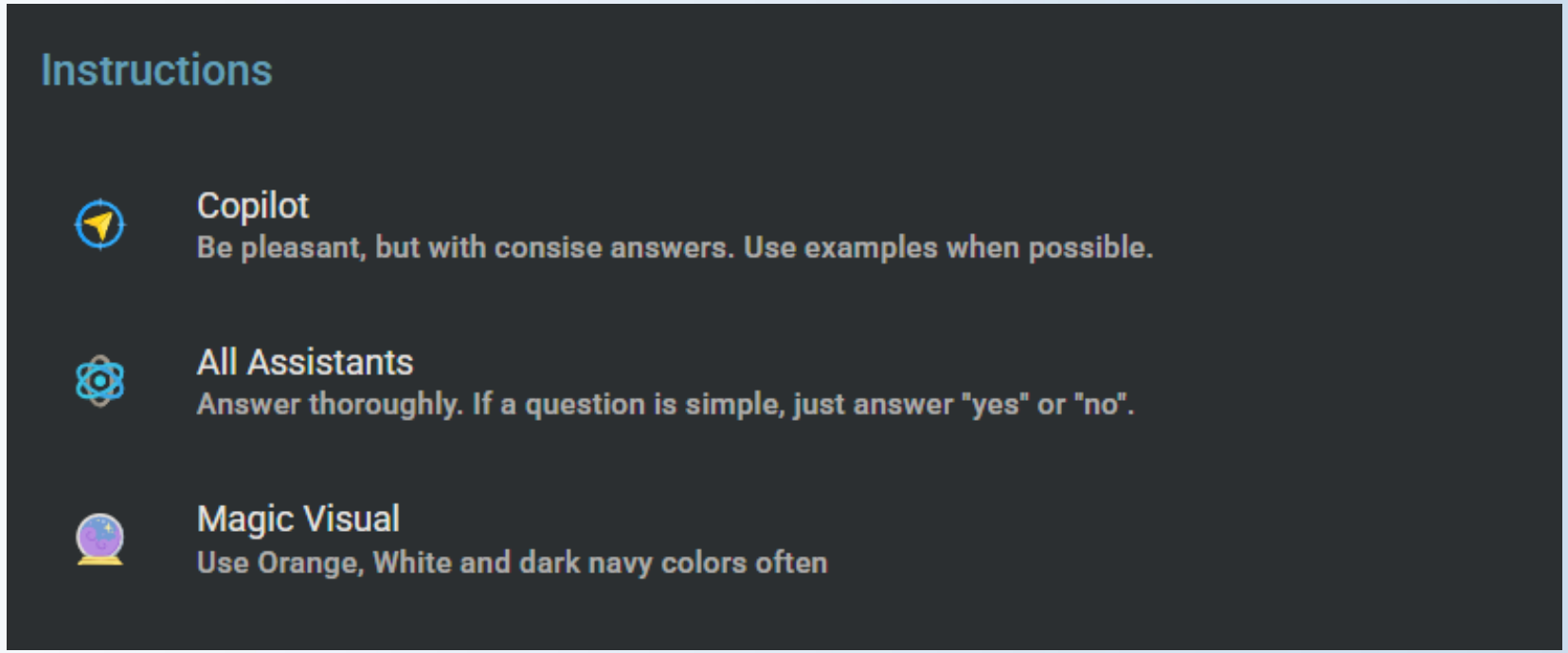
AI Instructions



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Integrations

- **Integrations** in Informer 5 allow you to connect Informer with external systems, applications, and services to automate workflows, synchronize data, and extend Informer's capabilities.

  - Google Drive
  - Microsoft One Drive
  - QuickBooks Assistant Skill
  - Salesforce Assistant Skill
  - Much more

- **Example**: AI Assistant can connect to Google Drive or One Drive to augment what data can be returned to the Assistant.

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Billing (2025.1.0)

- Activated when you opt in to use Entrinsik's AI features
- Tracks actual usage of features like AI, allowing organizations to pay for only what is used
- Administrators can view detailed usage statistics, costs, and billing history directly from the Administration page
- Tools to monitor, forecast, and manage spending, helping organizations stay within budget and optimize your Informer investment

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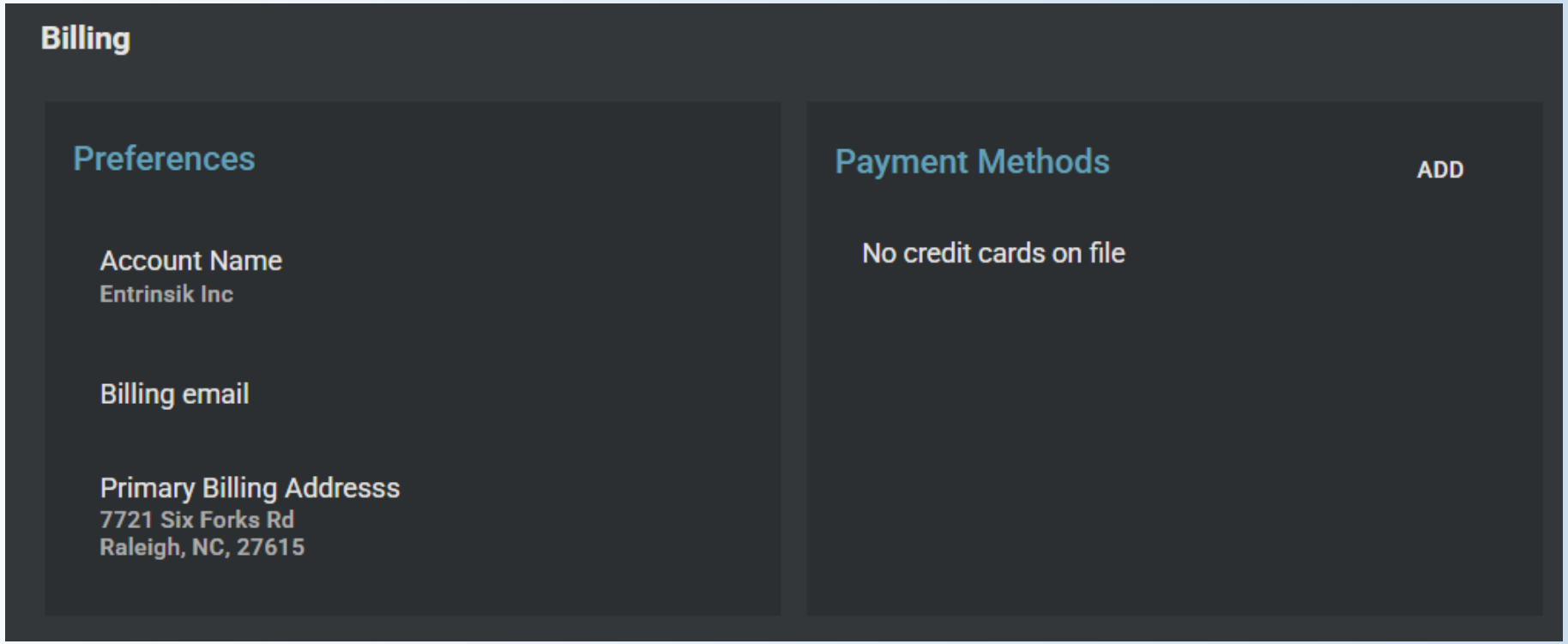
Billing Prefer & Pmt Methods



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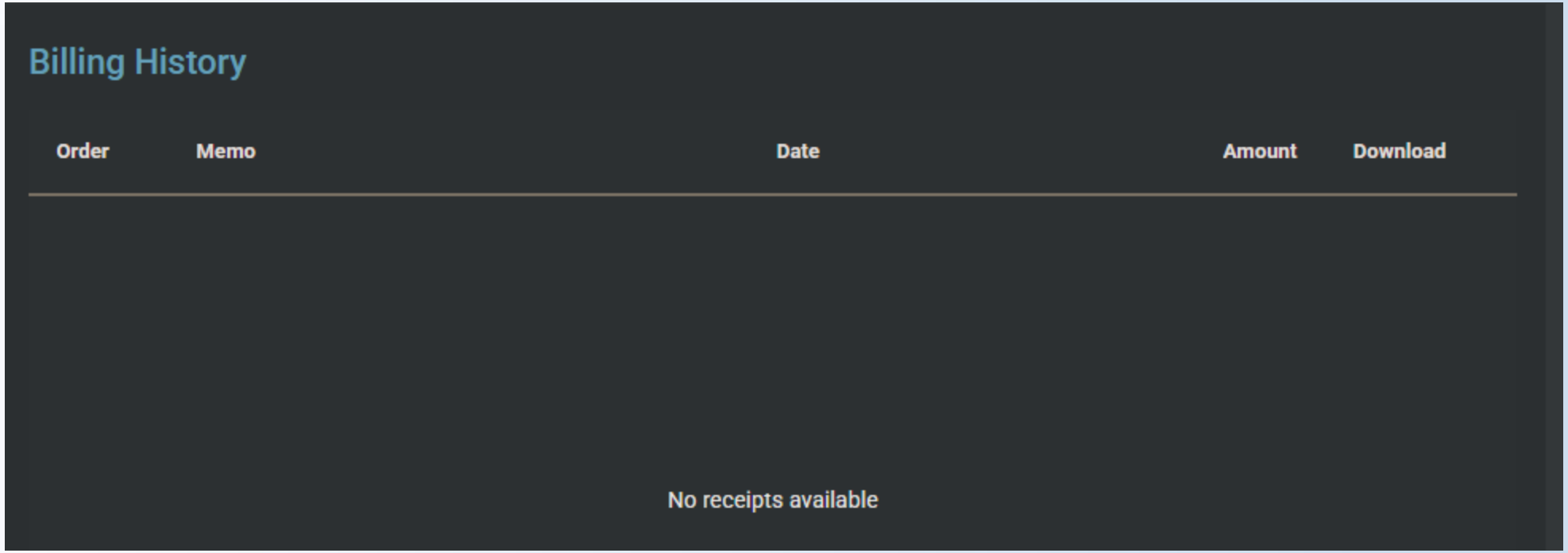
Billing History



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New Administration Settings

UX Updates (continual)

- Navigation is more streamlined
- Similar items grouped together
- Bundle import/export process is more intuitive, flexible and gives better feedback during process

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Common Troubleshooting Issues

Common Troubleshooting via the UI

- Auditing
- Logging
- Jobs
- System Health

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Common Troubleshooting Issues

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Auditing

- The point and click way to monitor system resources to help keep Informer running efficiently
- Who is using Informer? And how?
- How fast are queries running?
- What content is / isn't being used?
- See how users are using Informer, optimize slow-running queries across the system and clean out unused content from Informer

Think Launch Audit Report from Informer 4

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Common Troubleshooting Issues

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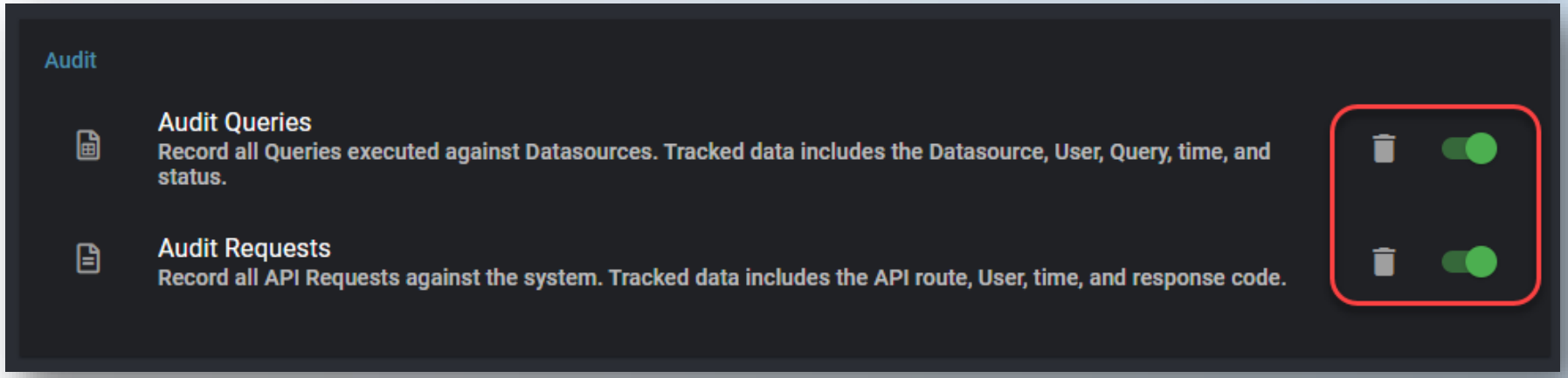
Auditing

System Audit (Administration > Settings > Audit)



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Common Troubleshooting Issues

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Audit Queries

- Records all Queries executed against Datasources
- Tracked data includes the Datasource, User, Query time and status
- Allows Administrators to track what parts of Informer are being used most often and when and who is using those parts

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Common Troubleshooting Issues

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Audit Requests

- Records all API Requests made against Informer
- Tracked data includes the API route, User, Time and Response Code
- Useful to Admins who want to keep Informer running at peak performance

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Common Troubleshooting Issues

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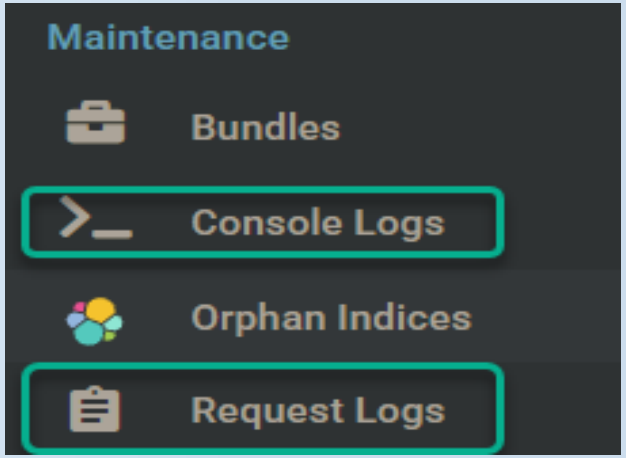
Logs

Console & Request Logs



Console Logs: Contains a live feed to API calls that Informer is making as they are made

Request Logs: Contains information about requests made of Informer, such as the time it took for a request to be processed, the type of request and additional information about a specific log message

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Common Troubleshooting Issues

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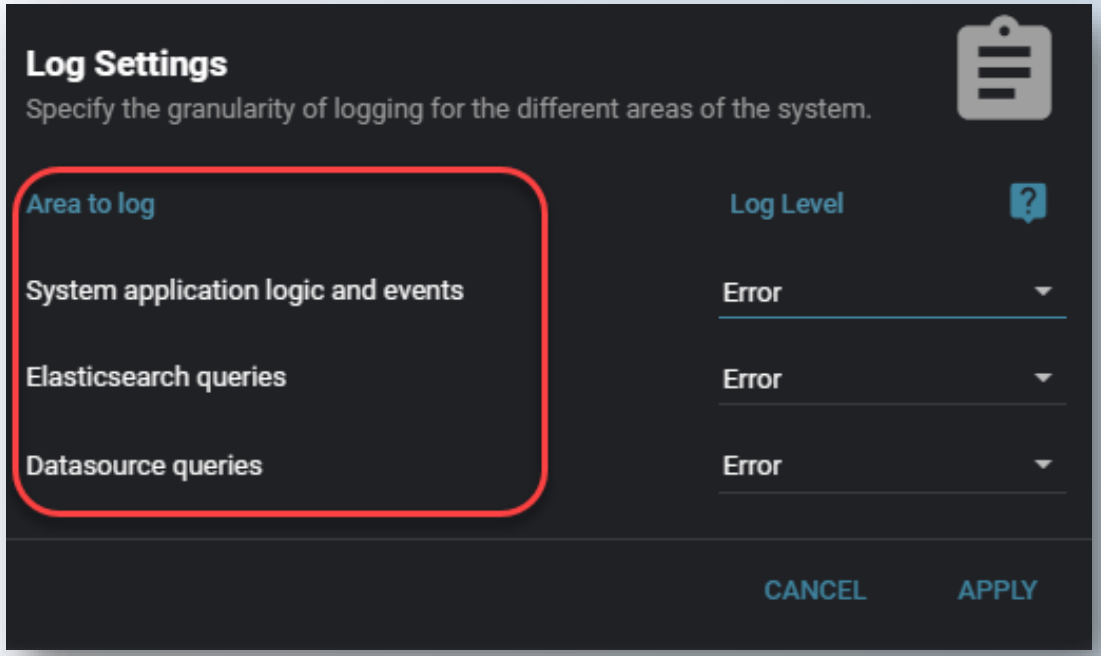
Logs



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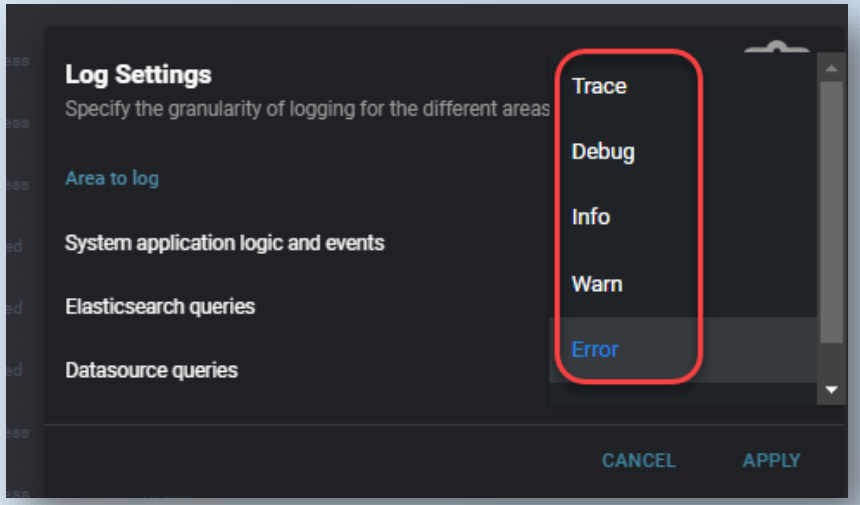
Logs

Log Levels



- None – No logs collected for area
- Error – Captures only events that prevents an action from completing
- Warn – Captures logs anytime something unexpected happens that Informer can handle

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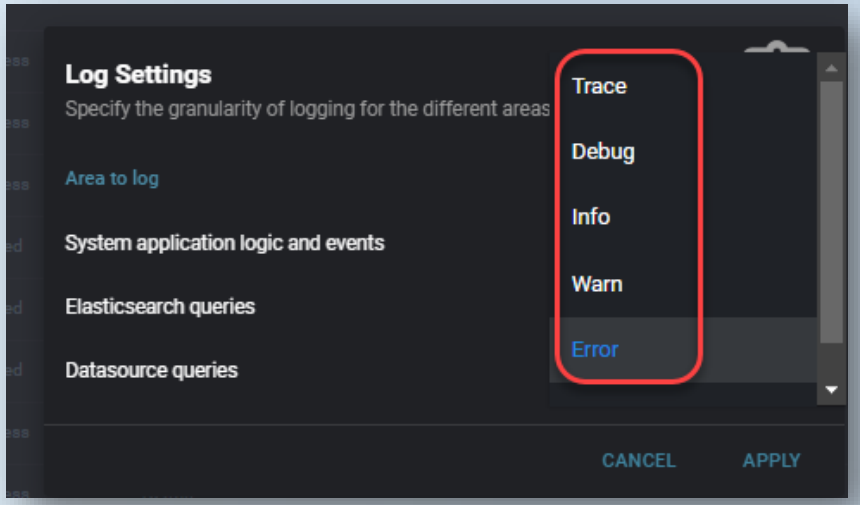
Logs

Log Levels



- Info – Lowest level of logs that also include successful requests and logs. Also contains all warnings and errors.
- Debug – 2nd highest volume of logging. Contains all debugging info.
- Trace – Highest level of logging. Captures all the logs included in Informer giving highest detail of what's happening all of the time.

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Why so many Logs?

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Feature	Console/Request Logs	Audit Queries and Requests
Focus	System-level events, errors, requests	User actions, data access, compliance
Detail Level	Very detailed, technical	Summary of user activity
Use Case	Troubleshooting, diagnostics	Auditing, security, accountability
Access	Admin console, server logs	Audit module, audit reports
Audience	IT, support	Admins, auditors, compliance

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Common Troubleshooting Issues

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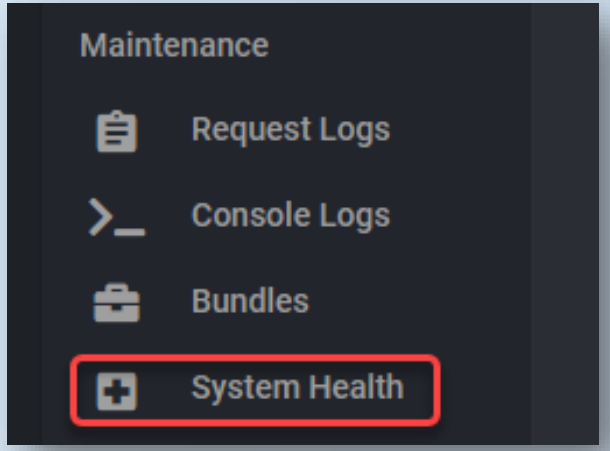
System Health

- Allows admins to see information on Datasets and Elasticsearch indices
- Can help admins understand what is happening in Elasticsearch from within Informer



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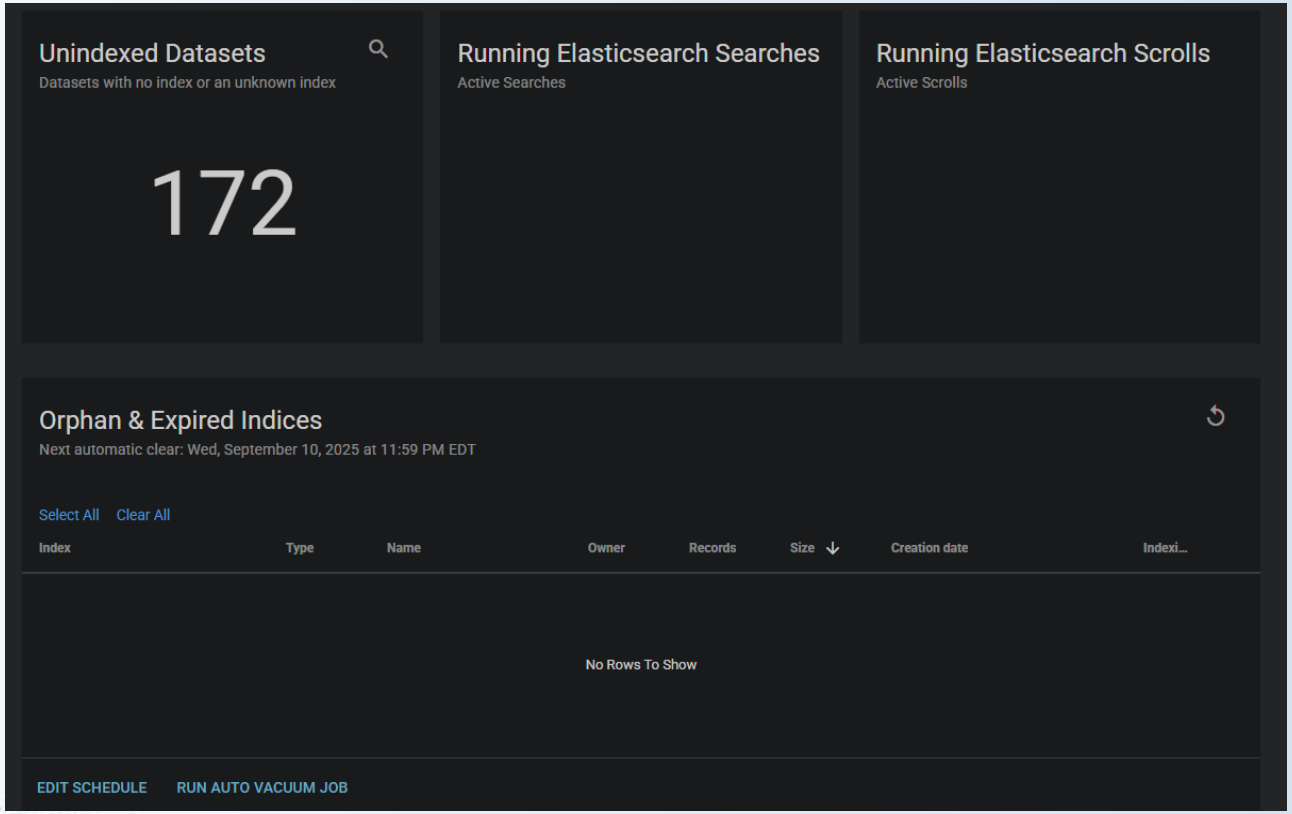
System Health



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System Health

Unindexed Datasets

A Dataset that doesn’t have any data because it’s not been refreshed, or the data has been cleared. Also, the Dataset could be missing an index if it’s deleted or corrupted at the Elasticsearch level.

Can drilldown to open a window that shows specifics

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System Health

Unindexed Datasets

Unindexed Datasets

Name	Owner	Status	Last Modified
Active Campus Org Memberships	admin	UNINDEXED	Jun 25, 2025, 4:59 PM
Current Enrollments	records	UNINDEXED	Jun 25, 2025, 4:59 PM
Unidata PERSON	admin	MISSING IN...	Jun 10, 2025, 2:07 PM
ta	admin	UNINDEXED	Jun 6, 2025, 2:44 PM
Financial Aid Awarded Test	admin	UNINDEXED	Jun 2, 2025, 9:15 PM
Financial Aid Awarded	financial-aid	UNINDEXED	May 27, 2025, 2:03 PM
Students	admin	MISSING IN...	May 14, 2025, 10:18 AM
Ticket 42087 U2 Integers are exported as ...	admin	MISSING IN...	May 13, 2025, 5:07 PM
ReqRes Users	admin	UNINDEXED	May 12, 2025, 9:58 AM

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System Health

- Running Elasticsearch Searches & Scrolls (active / real time)

- Searches: The current number of queries executed against the Informer system, typically representing user or system-initiated requests to retrieve data from Datasources.

- Scrolls: The process of retrieving large result sets in manageable chunks, allowing Informer to efficiently handle and display data that exceeds standard query limits.

  - Example: A user opens a dataset with 3M records; Informer fetches the first 10,000, then scrolls to get the next 10,000, and so on—each “chunk retrieval” registers as a “Scroll.”

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System Health

- Orphaned & Expired Indices
  - Indices (results) that don’t have an associated Dataset or Report. Their time on the system has expired but are still hanging around.
  - System delivered Auto Cleanup job should be running every night to vacuum these up. Check the Jobs area.

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System Health

- Query Benchmarking
  - Helps identify two possible bottlenecks in a query's performance
  - Indexing: evaluate the connection speed between Informer and Elasticsearch
  - Flow Steps: are there slowdowns because of a particular Flow Step?

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System Health

Benchmark Query

Launch a test-run of this Query to identify a bottleneck in performance. The test run will not impact your Dataset results.

Run Options

- [ ] Index results
- [ ] Run Flow Steps

Status	Flow	Index	Rows	RPS
Stopped	✓	✓	455,400	2.7k
Stopped	✓	-	79,901	5.8k
Stopped	-	✓	77,783	5.8k
Stopped	-	-	102,500	8.5k

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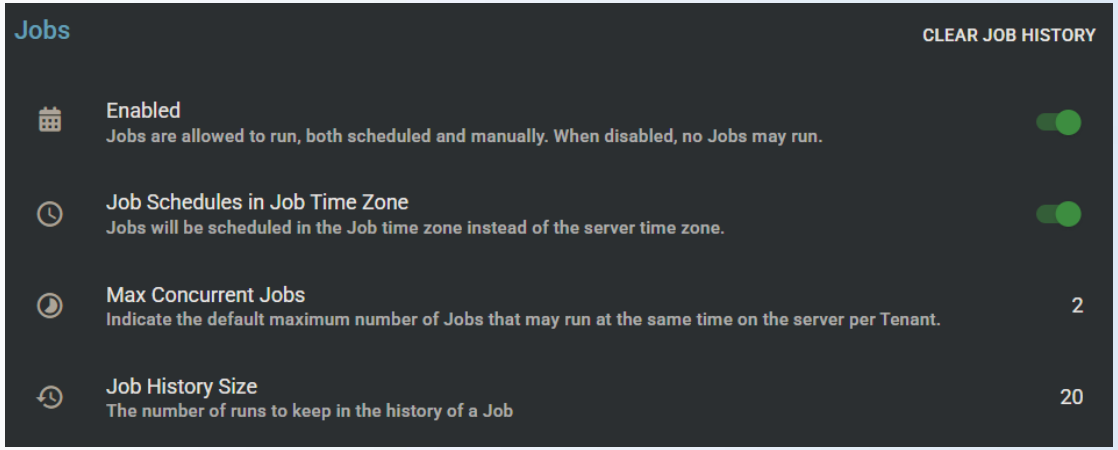
System Health - Jobs



Tips:

- ✓ Spread out Jobs – give them room to run and complete
- ✓ Lower the max concurrent number to lessen load on the system
- ✓ Lower Job History Size. The larger this is, a slower response time in the Job UI area will be seen

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Thank you!

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